

VERSATILE BASICS TRAINING

Agenda:

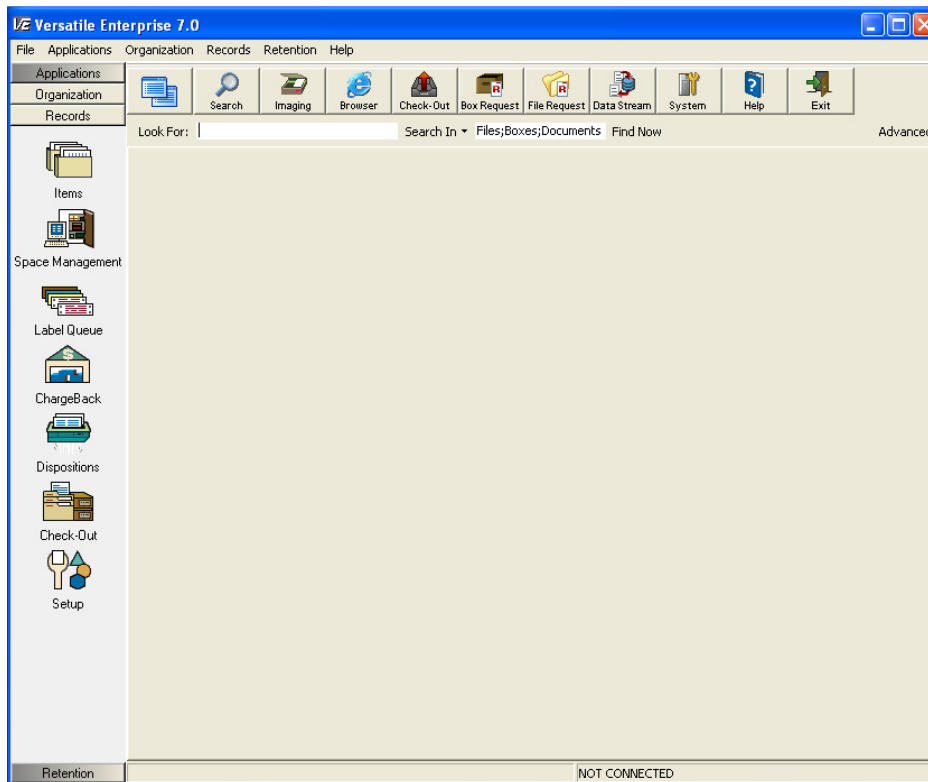
- General Versatile Functions
- Creating Files in Versatile
- Basic Search for Files/Boxes
- Q & A

From your desktop, double-click the VE icon & wait a few minutes:



GENERAL VERSATILE FEATURES

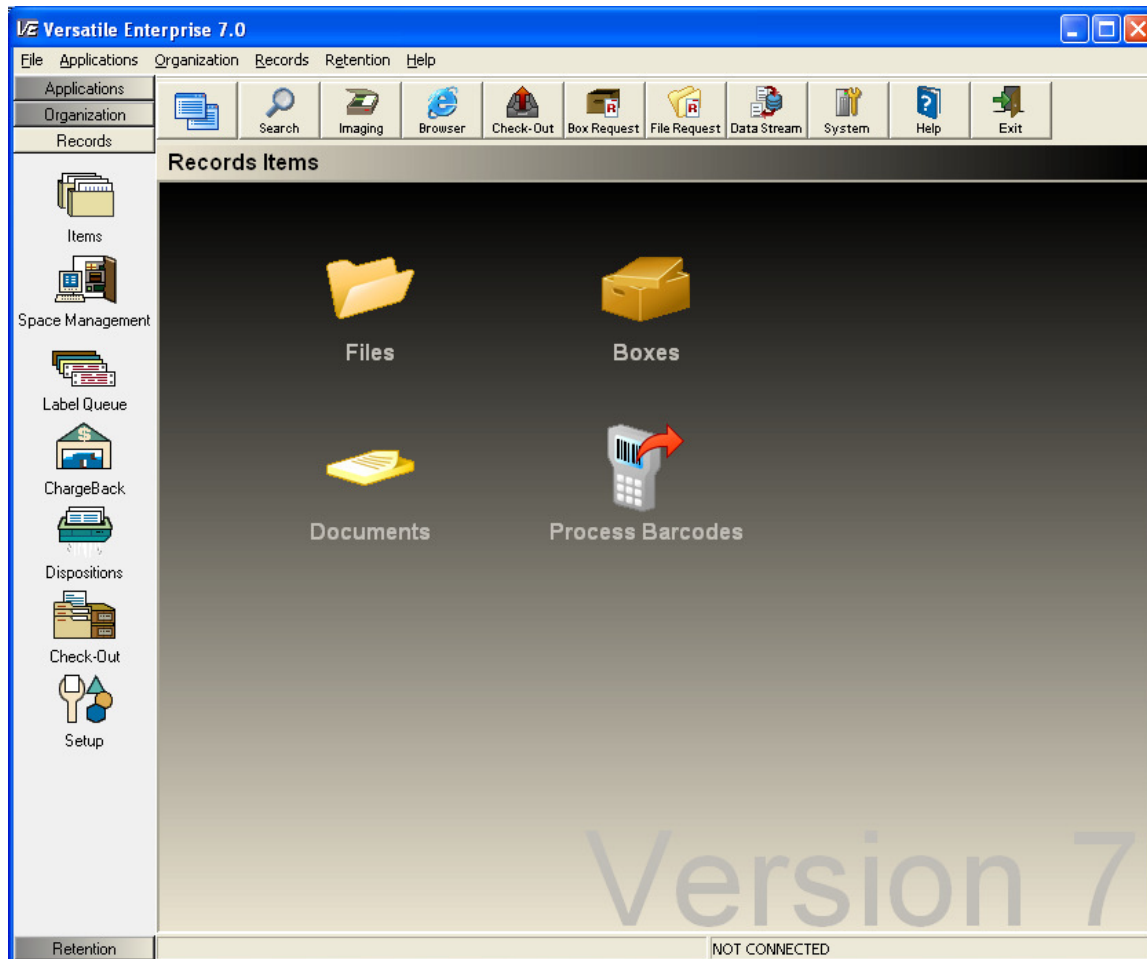
Signing In – Simultaneous Sign-In (No Log-in Screen)



- **4 Side Tabs** match the drop-downs above
- **Look For:** this will search at the **Box, File and Document** levels
- **Top Icons: Look For, Data Streams** and
 - **Search** – will show Boxes and Files and Documents if any
 - Right click to Open Results in Files or Boxes
 - **Browse** to toggle back to the list of files/boxes

RECORDS

- **Items:**
 - Files
 - Boxes
 - Documents – some do not have this one



Questions?

CREATING FILES IN VERSATILE

The screenshot shows the 'VE Files' application window. The 'Main' tab is active, displaying the following fields:

- Record No.:** A text field with a dropdown arrow and a link icon.
- Barcode:** A text field with a link icon.
- Company:** A dropdown menu showing 'U.S. EPA REGION 10 - Production'.
- Department:** A text field with a dropdown arrow.
- Record ID:** A dropdown menu showing 'XXXXXXXXXX'.
- Record Series:** A text field.
- Description:** A large text area with a vertical scrollbar.

On the right side, there is a 'Flags' section with checkboxes for:

- ☐ Label Printed
- ☐ Vital Record
- ☐ Destruct Review
- ☐ Option Flag 1
- ☐ Option Flag 2
- ☐ Annual File
- ☐ Official Copy
- ☒ Allow Check Out
- ☐ Closed

Below the 'Main' tab, there are several buttons: Search, Update, Delete, Add, Clear, Previous, Next, Print Label, Options, Spell Check, Check Out, and Export.

At the bottom, there is a 'General' section with fields for:

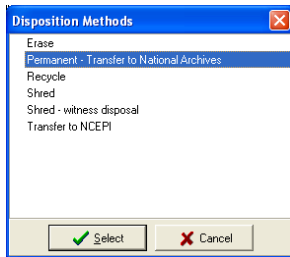
- Creation:** A date field (MM/DD/YYYY).
- Event:** A date field (MM/DD/YYYY).
- Submit:** A date field (MM/DD/YYYY).
- Misc:** A date field (MM/DD/YYYY).
- From:** A date field (MM/DD/YYYY).
- To:** A date field (MM/DD/YYYY).
- Media Type:** A dropdown menu showing '< None >'.
- Disposition:** A dropdown menu showing '< None >'.
- Submitted By:** A text field.
- Label:** A dropdown menu showing '< None >'.
- File Room:** A dropdown menu showing '< None >'.
- Office of Record:** A text field.

Auto Populates:

- Record No
- Barcode
- Company
- File ID
- Creation (after you complete the entry and press Add)
- Submit: (after you complete the entry and press Add)

Required Fields:

- Department – **Use ...**
- Record ID = Record Series + File ID - **Use...** to select Record Series
- Description: - **First 3 lines appear on label**
- From: **enter earliest date of documents**
- To: **enter latest date of documents**
- Media Type: **Paper**
- Disposition: **choose how to destroy or Permanent**



- Submitted By: **Choose your name**
- Label: **CRC Standard**
- File Room: choose where stored
- Office of Record: - **Use ...**

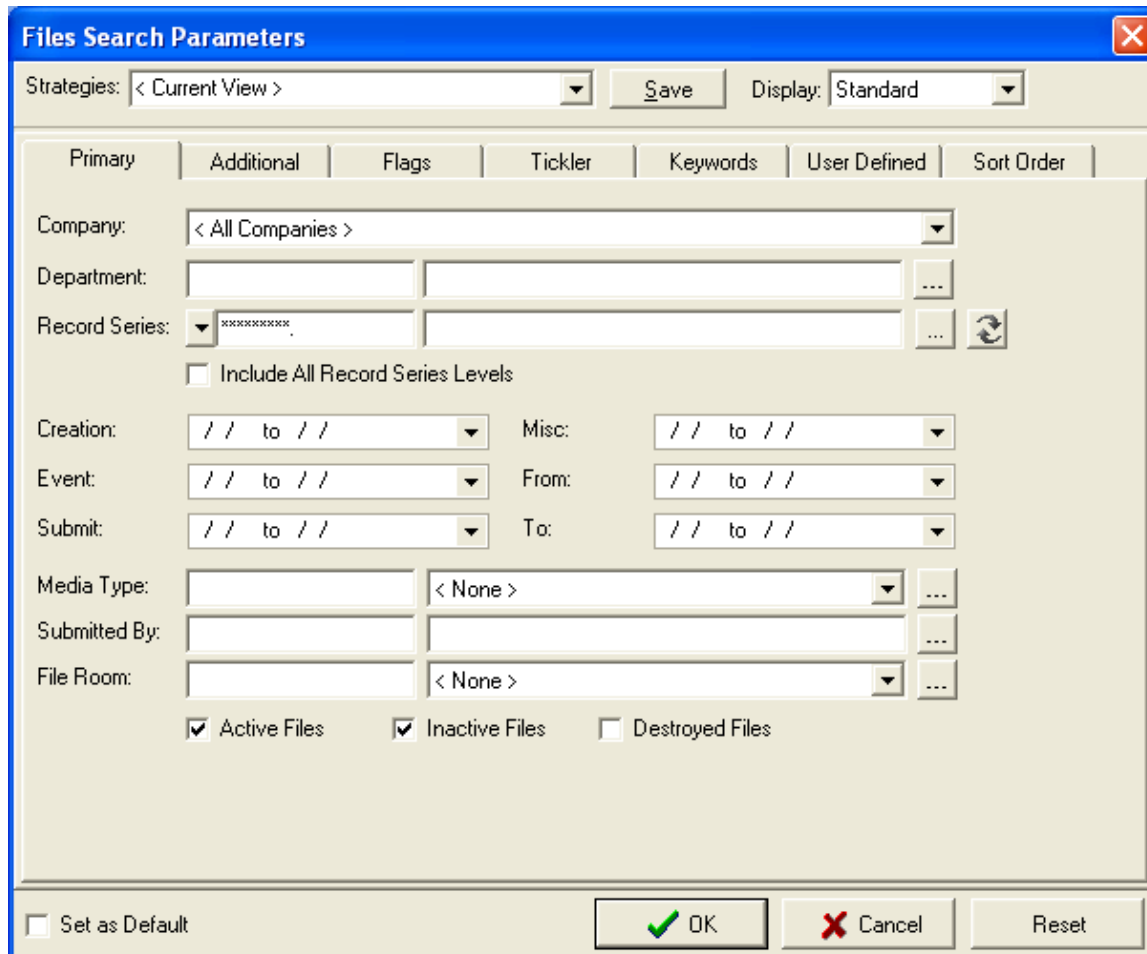
Click Add – this will assign the Records Number and the Barcode

Exit out of Files

Questions?

BASIC SEARCH FOR FILES/BOXES

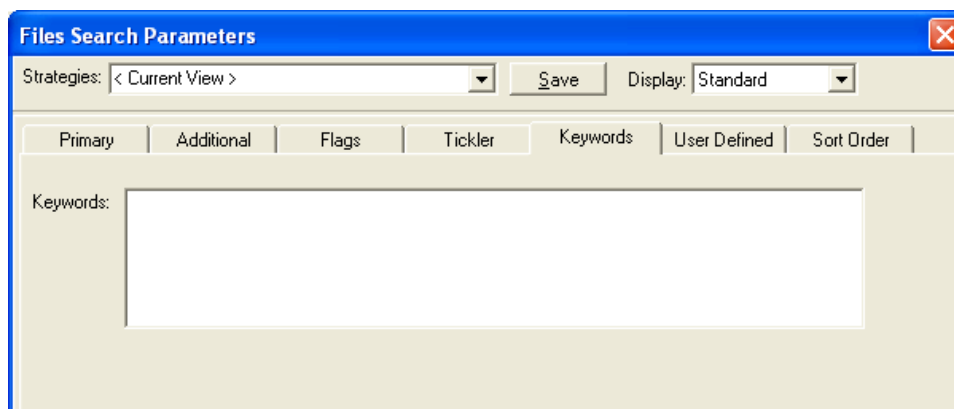
Click **Search** or **Folder** icon on the right-hand side



The **Files Search Parameters** dialog box is shown with the **Primary** tab selected. It features a top bar with a **Strategies** dropdown set to **< Current View >**, a **Save** button, and a **Display** dropdown set to **Standard**. Below this is a tabbed interface with **Primary**, **Additional**, **Flags**, **Tickler**, **Keywords**, **User Defined**, and **Sort Order**. The **Primary** tab contains the following fields: **Company** (dropdown: **< All Companies >**), **Department** (text input), **Record Series** (dropdown: **xxxxxxxx**), **Include All Record Series Levels** (checkbox), **Creation** (date range: **// to //**), **Misc** (date range: **// to //**), **Event** (date range: **// to //**), **From** (date range: **// to //**), **Submit** (date range: **// to //**), **To** (date range: **// to //**), **Media Type** (text input), **Submitted By** (text input), **File Room** (text input), and checkboxes for **Active Files**, **Inactive Files**, and **Destroyed Files**. At the bottom, there is a **Set as Default** checkbox, an **OK** button with a green checkmark, a **Cancel** button with a red X, and a **Reset** button.

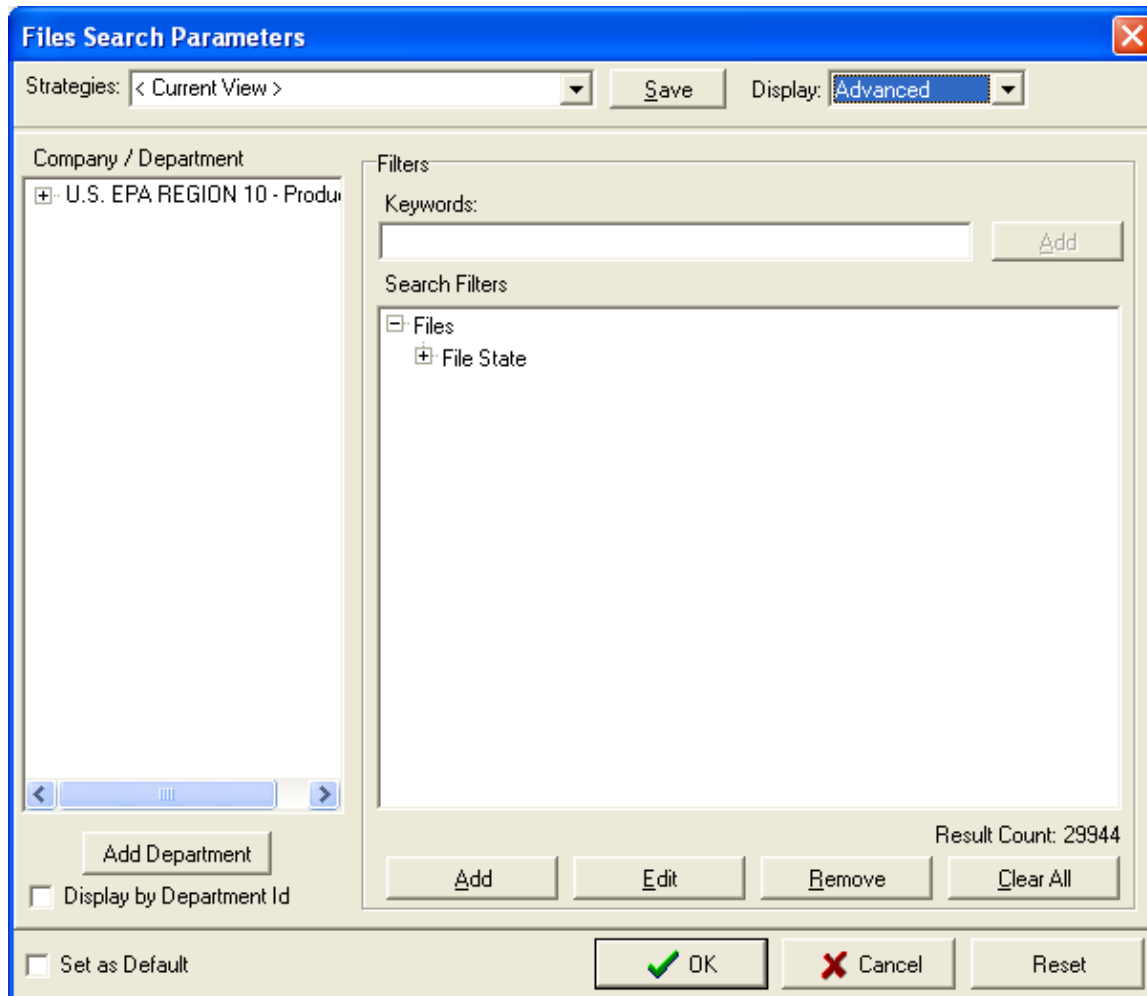
Standard Search

- **Keywords** tab
- Enter keywords – see “**Searching with Oracle Full-Text**” hints



The **Files Search Parameters** dialog box is shown with the **Keywords** tab selected. The **Keywords** field is a large text input area.

Advanced Search



The image shows a 'Files Search Parameters' dialog box. At the top, there is a 'Strategies:' dropdown menu set to '< Current View >', a 'Save' button, and a 'Display:' dropdown menu set to 'Advanced'. Below this, the dialog is split into two main sections. The left section, titled 'Company / Department', contains a list box with one item: 'U.S. EPA REGION 10 - Production'. Below the list box is an 'Add Department' button and a checkbox labeled 'Display by Department Id'. The right section, titled 'Filters', contains a 'Keywords:' text field with an 'Add' button next to it. Below the keywords field is a 'Search Filters' list box containing 'Files' and 'File State'. At the bottom right of the dialog, it says 'Result Count: 29944'. Below this are buttons for 'Add', 'Edit', 'Remove', and 'Clear All'. At the very bottom are 'OK' (with a green checkmark), 'Cancel' (with a red X), and 'Reset' buttons. There is also a 'Set as Default' checkbox on the bottom left.

- **Company/Department** > **Add Department**
- **Keywords** – Use “**Searching with Oracle Full-Text**” hints
- **Add** – for special fields
- **NOTE: Result Count** – may give you a clue to whether you’re on the right track with your search criteria
- **OK** – to do the search
- **Reset** – to clear criteria for the next search

SEARCH FILES – RESULTS

IVE Files

Main | Extended Description | User Defined | Documents | Attachments

Descriptive Information

Record No: 1872 Barcode: \$00001872

Company: U.S. EPA REGION 10 - Production

Department: VAI/ AIR

Record Id: ENF00207B. ORBRISGO0001 YR 199 File Sts Inactive

Record Series: Enforcement Action Files - Routine Legal Action Required

Description: BRISTOL SILICA & LIMESTONE CO - GOLD HILL, OR ENF/COMP-1998

Flags

- ☒ Label Printed
- ☐ Vital Record
- ☐ Destruct Review
- ☐ Option Flag 1
- ☐ Option Flag 2
- ☐ Annual File
- ☐ Official Copy
- ☒ Allow Check Out
- ☐ Closed

Search | Update | Delete | Add | Clear | Previous | Next | Print Label | Options | Spell Check | Check Out | Export

General | Location | Additional | Retention | Tickler | Activity | Ranges

Creation: 04/29/1999 Media Type: P Paper

Event: / / Disposition: R Recycle

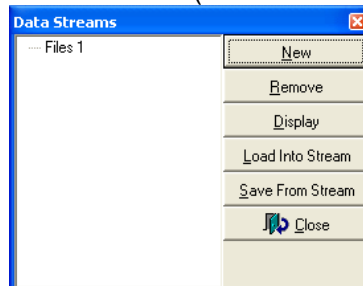
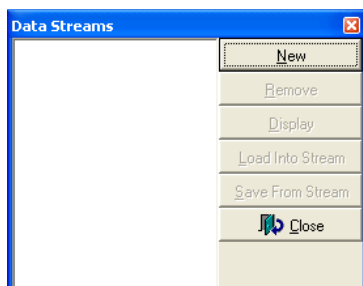
Submit: 04/29/1999 Submitted By: <None>

Misc: / / Label: <None>

From: 01/01/1998 File Room: <None>

To: / / Office of Record: <None>

- **Previous** or **Next** buttons
- **Browse Files** – gives you a list of results and to **TOGGLE** between views
 - **Customize Columns** – right click
 - Remove columns you don't need
 - **Sort Order** – put columns title above
 - **Export to Excel File**
 - **Add to Data Stream** – select files (use **Shift** key)



- **New**
 - **Load Into Stream** (you can use default or rename)
- **Data Streams** – to add selected items for compilation
- **Reports** – to create a report with the data

SEARCH BOXES – RESULTS

The screenshot shows the 'IVE Boxes' application window. The 'Main' tab is selected, displaying 'Box Identifiers' and 'Location' fields. The 'Box Number' is 2123, 'Accession Number' is 412-02-0051, 'FRC Location' is empty, and 'Barcode ID' is %00002129. The 'Location' section shows 'Box Type' as FRC STANDARD BOX and 'Record Center' as Federal Records Center. The 'Descriptive Information' section shows 'Company' as U.S. EPA REGION 10 - Production, 'Department' as /EC/WL/, 'Record Series' as PERM0205C, and 'Description' as WALLA WALLA DISTRICT PERMIT CLOSED 10/2001 BOX 2 OF 2. The 'General' tab is selected, showing 'Creation' as 11/29/2001, 'Submitted By' as HKIM, 'Label Type' as <None>, 'Submit' as 11/29/2001, 'Disposition' as R, and 'Recycle' as Recycle. The 'Label Printed' checkbox is unchecked. The right sidebar contains buttons for Search, Update, Delete, Add, Clear, Previous, Next, Itemize Files, Print Label, Options, Spell Check, and Check Out.

Box Identifiers		Location	
Box Number:	2123	Box Type:	FRC STANDARD BOX
Accession Number:	412-02-0051	Record Center:	Federal Records Center
FRC Location:			
Barcode ID:	%00002129		

Descriptive Information	
Company:	U.S. EPA REGION 10 - Production
Department:	/EC/WL/
Record Series:	PERM0205C
Description:	WALLA WALLA DISTRICT PERMIT CLOSED 10/2001 BOX 2 OF 2

General	
Creation:	11/29/2001
Submitted By:	HKIM
Label Type:	<None>
Submit:	11/29/2001
Disposition:	R
Recycle:	Recycle
Misc:	
From:	
To:	
<input type="checkbox"/> Label Printed	

- See functions for Files

Note: If you see a **Flashlight**, you can enter a number and do a “Look-up”



Questions?